

# Tips for Managing Your E-mail Using Rules in Outlook

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## Tips for Managing Your Rules in Outlook

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Are you overwhelmed by the number of e-mail messages in your **Inbox**? Instead of constantly organizing an ever-growing number of messages manually, use the **Rules Wizard** to help you automatically process and organize your messages. After you use the **Rules Wizard** to create a rule, Outlook applies it when messages arrive in your **Inbox**, or when you send a message.

### What is a rule?

In Outlook, a rule is a set of conditions, actions, and exceptions that processes and organizes messages automatically and that is triggered by an event.

Think of the relationship between the event, condition, action, and exception this way:

An event triggers the rule. For example, you can select Check messages when they arrive as the event.

A condition specifies the messages that the rule will apply to. For example, you can select sent only to me or where my name is in the Cc box as conditions. You can select one or many conditions. If you do not select any conditions, it is the same as selecting all conditions.

An action specifies what should be done with qualifying messages. You can select one, many, or no actions. For example, you can select delete it if you do not want to read messages that have the word "jokes" in the Subject line.

An exception specifies which messages will not be affected by the rule. You can select, one, many, or no exceptions. A rule is not applied to a message if any one of the exceptions you specify is met. For example, you can delete all messages with the word "jokes" in the Subject line, except those from your cousin (whose jokes you like).

### What can I use rules for?

You can automatically:

Move messages to a particular folder based on who sent them.

Move certain kinds of messages, such as Out of Office messages, to another folder.

Delete messages in a conversation.

Flag messages from a particular person.

Set up a notification, such as a message or a sound, when important messages arrive.

Redirect a message to a person or to a distribution list.

Ask the server to automatically reply to a certain type of message by using a message you've created.

Assign categories to messages you send based on the contents of the messages.

Delay delivery of messages by a specified amount of time.

Start a program.

### **How can I make rules run more smoothly?**

#### **Order the sequence in which your rules operate**

Order your rules with the following in mind: Rules running on the server, such as Microsoft Exchange Server, always operate first, followed by those running in Outlook on your computer.

Within these two categories, you can change the order in which your rules operate by moving them up or down in the Apply rules in the following order list in the Rules Wizard. Just select a rule, and then click Move Up or Move Down.

To apply rules only to the messages on your computer, select on this machine only as a condition.

To avoid multiple rules operating on the same message, especially if you don't want the bottom-most rule to prevail when multiple rules apply, select stop processing more rules as an action.

#### **Avoid inadvertent errors when you create rules**

To avoid mistyping, create rules based on a message. Open a message, and then on the Actions menu, click Create Rule. Many conditions and exceptions are filled in for you.

To test newly created rules, select Run this rule now on messages already in "Inbox".

To back up your rules by exporting them to an .rwz file, in the Rules Wizard dialog box (Tools menu, Rules Wizard command), click Options, and then click Export Rules. You can even import this file to another computer or to a laptop, so you don't have to

recreate your rules and risk introducing errors in the process.

### **Speed up processing your rules**

Avoid conditions and exceptions that search for words in the message body. Unless your e-mail messages are short, this search could take a long time.

Select with specific words in recipient's address or with specific words in sender's address as a condition instead of sent to people or distribution list or from people or distribution list. Searching for a specific name or word in the To or From field is faster than searching through distribution lists.